SATERN

SYSTEM FOR ADMINISTRATION, TRAINING, AND EDUCATIONAL RESOURCES FOR NASA

INDIVIDUAL DEVELOPMENT PLANNING

FOR SUPERVISORS ONLY

APPROVE / REJECT AN IDP

When an employee submits an IDP for your review, you will receive an email notification. The email will be from **NASA-satern** and the subject line will read: **SATERN Individual Development Plan Review and Approval Request**.

- Log in to SATERN at *https://satern.nasa.gov*.
- On your homepage, click the red alert text that reads: **You have Subordinate Development Plans that require Review and Approval**.
- Click **Review** next to the plan you wish to view.
- Confirm that you are viewing the intended IDP; the employee's name will be next to **Currently Viewing** at the top of the screen.
- View development activities by clicking ▶ next to each goal name, and view further activity details by clicking **View Item Details**.
- *Optional*: To add notes for the employee, click **View/Add Notes** next to the section on which you would like to comment. Enter comments in the **Add Comments** text box and click **Add**.
- Click **Back** to return to the main page.
- Click **Accept** or **Reject**. If you reject the IDP, you must add comments regarding your reason for rejection. Enter your comments in the **Add Plan Review Comments** text box and click **Reject**.
- To exit the employee's IDP, click **Return to your records** at the top of the screen.

    NOTE: When an employee resubmits an IDP after rejection and editing, follow the same procedure above to accept or reject it again.

RUN EMPLOYEE REPORTS

As a supervisor, you can run reports in SATERN that will help you monitor the progress that your direct reports have made toward IDP goals. The **Individual Development Plan** report includes data on goals, development activities, comments, and progress; the **Learning History** report includes data on *completed* catalog items and external activities.

- On your homepage, select the **Reports** tab.
- From the **Report Name** list, select either **Individual Development Plan** or **Learning History**.
- Choose to run a report for yourself (select **Self**), your direct reports (select **Direct Subordinates**), all of your reports (select **All Subordinates**), or all of them (select **All**).
- Select the desired **Report Format**.
- Click **Run Report**.
- The report displays in a separate pop-up window. Print the report(s) as you would any other document.
- Close the pop-up window.

GLOSSARY

CATALOG ITEM—Any learning or development activity listed in SATERN

COMPETENCY-BASED GOAL—A development goal that corresponds to a specific NASA competency in the Competency Management System (CMS)

DEVELOPMENT ACTIVITY—Any activity that builds expertise or skills; in the IDP, these are classified as either catalog items or external activities

EXTERNAL ACTIVITY—Any learning or development activity that is not listed in SATERN (e.g., conference, college course, on-the-job training); may or may not require a NF-1735

NON-COMPETENCY-BASED GOAL—A development goal that does *not* correspond to a NASA competency; articulated by the user in a free-form text field

PRIORITY—The level of importance of a goal or activity; can be Critical (1), Essential (2), or Significant (3)

   Critical: Should be achieved/completed during this IDP cycle; not doing so will jeopardize organizational mission accomplishment

   Essential: Must be achieved/completed in order to accomplish organizational mission objectives, or to carry out job responsibilities

   Significant: Achievement/completion is not directly related to current job description, but will appreciably improve skill set

TARGET DATE—The date by which you plan to complete the development activity

TARGET VALUE—The number associated with a value-based activity (e.g., **40** hours, **18** months)

VALUE-BASED ACTIVITY—Any development activity that can be measured numerically or quantified (e.g., 40 hours, 18 months); only applies to external activities, such as on-the-job training

HELP Resources

- **Help Desk:** 1-877-NSSC123 (1-877-677-2123) or *nasa-satern.support@nasa.gov*
- **SATERN Info Site:** https://saterninfo.nasa.gov
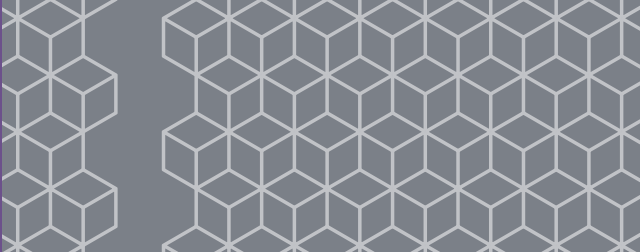- **Center Training Office**

TAKE CONTROL OF YOUR LEARNING AND DEVELOPMENT AT NASA

QUICK Reference Guide

The **Individual Development Plan (IDP)** in SATERN allows you to document short-range, mid-range, and long-range career goals, as well as the training and development activities required to reach each goal. The IDP can then be updated as you complete these activities.

CREATE AN IDP

- Log in to SATERN at *https://satern.nasa.gov*.
- On your homepage, select the **Career** tab.
- Click **Development Plan**.
- Click **Create New Plan**.
- Enter required fields: **Plan Title** (e.g., IDP 2008) & **Expiration Date** (e.g., 04/30/2009). Other fields are optional (e.g., **Coach/Mentor**).
- Click **Add**.

Your **Plan Information** is now complete.

ADD A GOAL

After you have created an IDP, the **Modify Individual Development Plan** screen displays. On this screen, you can add *competency-based goals* or *non-competency-based goals*. The business and technical competencies in SATERN are representative of those listed in NASA's Competency Management System (CMS).

ADD A COMPETENCY-BASED GOAL

- Click **Add Goal** in the appropriate section: *Short-Range, Mid-Range,* or *Long-Range.*
- Select **Competency**.
- Click **Next**.
- Enter keywords that relate to your desired competency.
- Select a search type.
- Click **Next**.
- Select the checkbox for the competency that best reflects your goal. (You may choose more than one to create multiple goals at once.)
- Click **Next**.
- Confirm or edit the required fields: **Goal Name**, **Target Rating** (use default rating of 1), & **Target Date**. **Priority** level is an optional field.
- Click **Done** or **Save and Add Another**.

ADD A NON-COMPETENCY-BASED GOAL

- Click **Add Goal** in the appropriate section: *Short-Range, Mid-Range,* or *Long-Range.*
- Select **Other**.
- Click **Next**.
- Enter required fields: **Goal Name** & **Target Date**. Other fields are optional (e.g., **Goal Description** & **Priority** level).
- Click **Done** or **Save and Add Another**.

ADD A DEVELOPMENT ACTIVITY

After you have added a goal, you must add at least one development activity to support it. Otherwise, you will receive a "validation error" (indicated in red at the top of the screen) when you submit the IDP. On the **Modify Individual Development Plan** screen, you can add a *catalog item* from SATERN or an *external activity* that is not in SATERN.

ADD A DEVELOPMENT ACTIVITY—CATALOG ITEM

- Click ▶ to the left of the Goal Name.
- Click **Add Activity**.
- Select **Catalog Item**.
- Click **Next**.
- Select **Item Type**(s).
- Enter keywords next to the criteria you wish to use to search SATERN for items. (**NOTE:** For a broader search, you may need to remove the competency that populates the search criteria automatically.)
- Click **Next**.
- Select the checkbox for the item you wish to include. (There may be multiple pages of items. You may choose more than one item to add multiple activities at once.)
- Click the **Next** button at the bottom of the screen.
- Confirm or edit the required fields: **Activity Name** & **Target Date**. **Priority** level is an optional field.
- Click **Done**.

ADD A DEVELOPMENT ACTIVITY—EXTERNAL

- Click ▶ to the left of the Goal Name.
- Click **Add Activity**.
- Select **External Activities**.
- Click **Next**.
- Confirm or edit the required fields: **Activity Name** & **Target Date**. **Priority** level is an optional field.
- Select the **Value-Based** checkbox and enter a **Target Value** if the activity can be measured numerically or quantified (e.g., **40** hours, **18** months).
- If the development activity *does* require a NF-1735, uncheck the **Record Completion** box. If the activity *does not* require a NF-1735, leave the box checked.
- Click **Done**.

SUBMIT AN IDP

After all goals and activities have been added, the **Modify Individual Development Plan** screen displays.

- Click **Submit for Approval**.
- Confirm that your **Plan Status** is now **Submit/Pending**.

PRINT AN IDP

To print an IDP, you must create an *Individual Development Plan* report.

- Select the **Reports** tab.
- Click **Individual Development Plan**.
- Select the desired **Report Format**.
- Identify the IDP you wish to print using the search criteria.
- Click **Run Report**.
- The report displays in a separate pop-up window. Print the report as you would any other document.
- Close the pop-up window.

FOR COACHES & MENTORS ONLY

VIEW AN IDP & ADD COMMENTS

As a coach/mentor, you may be asked by your coachee/mentee to review and comment on his/her draft IDP in SATERN.

- Log in to SATERN at *https://satern.nasa.gov*.
- On your homepage, select the **Career** tab.
- Click **View Other Learners' Plans**.
- All the IDPs to which you have been granted access will display. Click **View IDP** next to the appropriate IDP.
- You are now viewing your coachee's/mentee's IDP (note his/her name next to the **Learner** label). View development activities by clicking ▶ next to each goal name, and view further activity details by clicking **View Item Details**.
- *Optional:* To add notes, click **View/Add Notes** next to the section on which you would like to comment. Enter comments in the **Add Comments** text box and click **Add**.
- Click **Home** or **View Other Plans** to return to the main page.

  NOTE: Coaches/mentors are not alerted via email when an IDP is ready for review in SATERN, nor is the coachee/mentee alerted via email when the comments are complete. The two parties must communicate this outside of SATERN. However, the **coachee/mentee must grant you access to the IDP in SATERN in order for you to view the draft**.